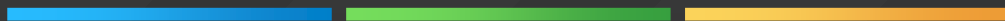




State of Delaware



January 2020

Mike Russo, Director of National Sales, Employer Solutions

Today's agenda



Introduction to American Well

Our Mission: To connect and enable providers, insurers, patients, and innovators to deliver greater access to more affordable, higher quality care

Our Vision: Digital care delivery will transform healthcare



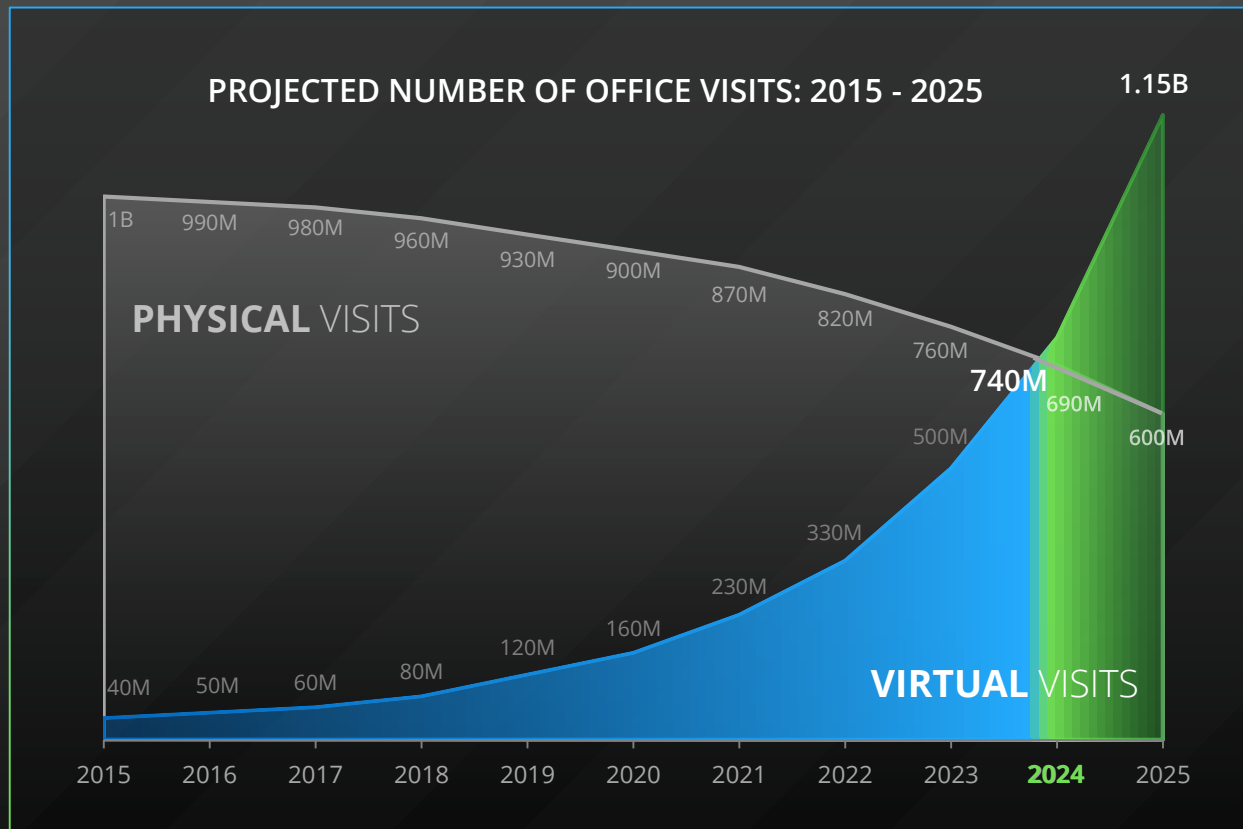
Telehealth Is Becoming Healthcare (And Vice Versa)

FORTUNE MAGAZINE

Here's What Your Future
Doctor Visits Could Look Like

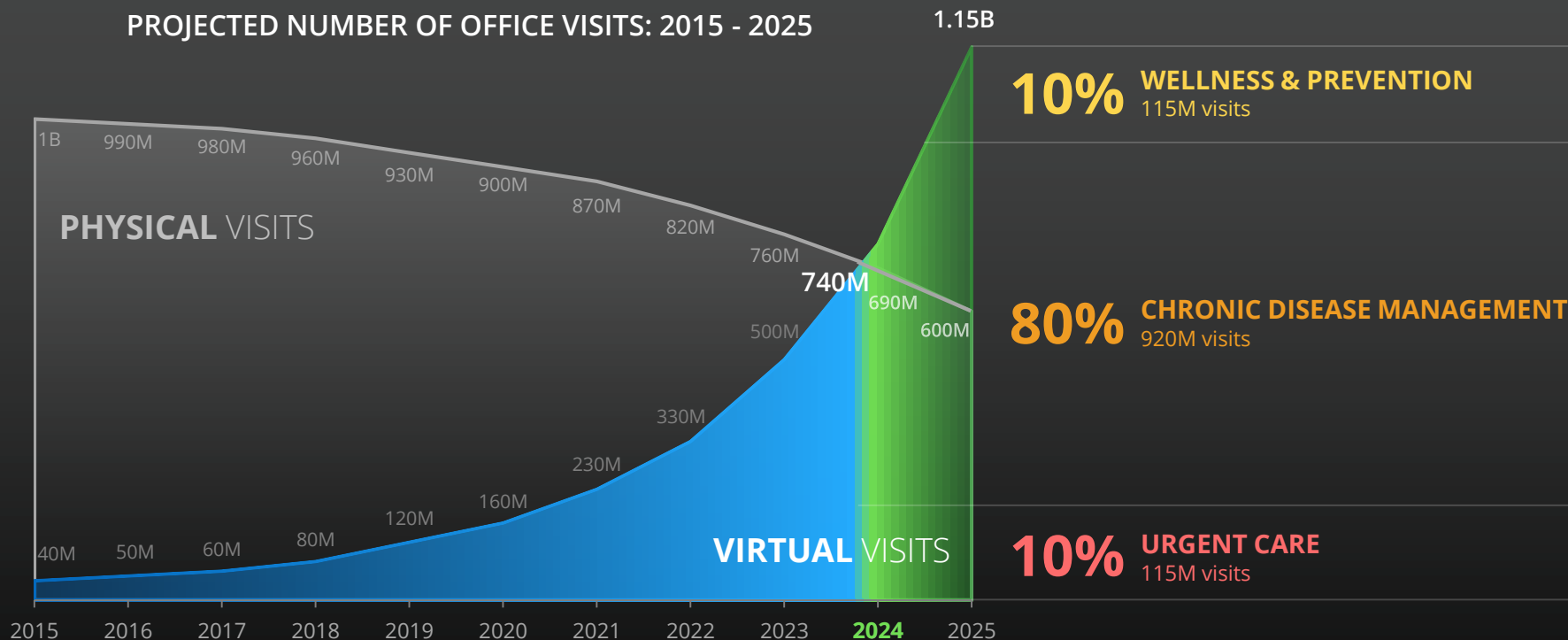
“ Tomorrow's
office visit will
increasingly take
place everywhere
but the office.”

- Dr. Eric Topol
May 2nd 2017



Source: Fortune, Ray Dorsey/Eric Topol - <http://fortune.com/2017/05/02/brainstorm-health-2017/>

Beyond urgent care



Source: Fortune, Ray Dorsey/Eric Topol - <http://fortune.com/2017/05/02/brainstorm-health-2017/>

Health systems use telehealth across the spectrum of care

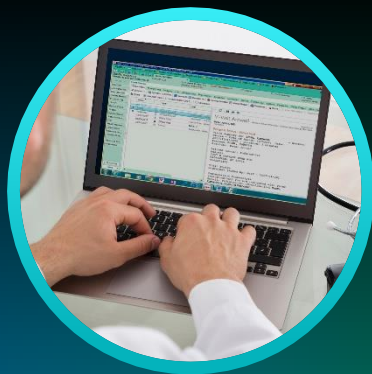
Patient & Provider



On Demand Telehealth

Typically **On-demand primary care**

Urgent Care, Pediatrics, Behavioral Health Kiosks, Employers, Retail Locations



Follow-Up Care

Typically **Scheduled visits** with own Patients

Post-Discharge Follow-Up, Cancer Care Chronic Care, Medication Management



Sub-Acute Telehealth

Typically **Acute Care Consults**

Presenter to provider in schools, SNFs, hospital rooms

Provider & Provider



Acute Care Telehealth

Typically **Acute Care Consults**

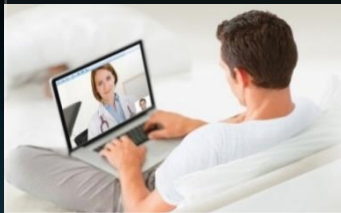
Provider to provider in tele-stroke, tele-ICU

Telehealth applications built for and with our clients

Urgent and Primary Care



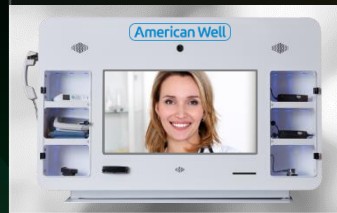
Follow Up Care



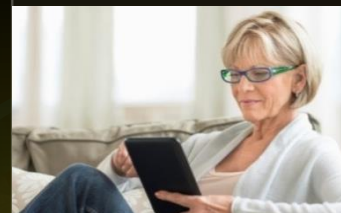
Health and Wellness



Clinic and Retail Care



Cancer Care



Student Health



Concierge Advisory



Nutrition and Diet



Women's Health



Specialty Programs



ER Triage



Behavioral Health



Employee Health



Pre and Post Surgery



Pediatrics and New Moms



A delightful consumer experience on all form factors



On The Go



At Home



At Work



Phone

We are constantly working to better understand the industry

Telehealth Index: 2019 Consumer Survey



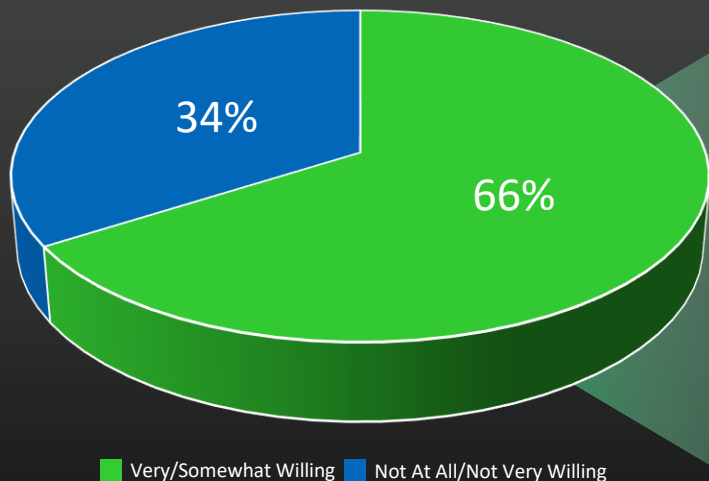
2000+ consumers across the U.S. | Fielded in December 2018 | Nationally projectable survey



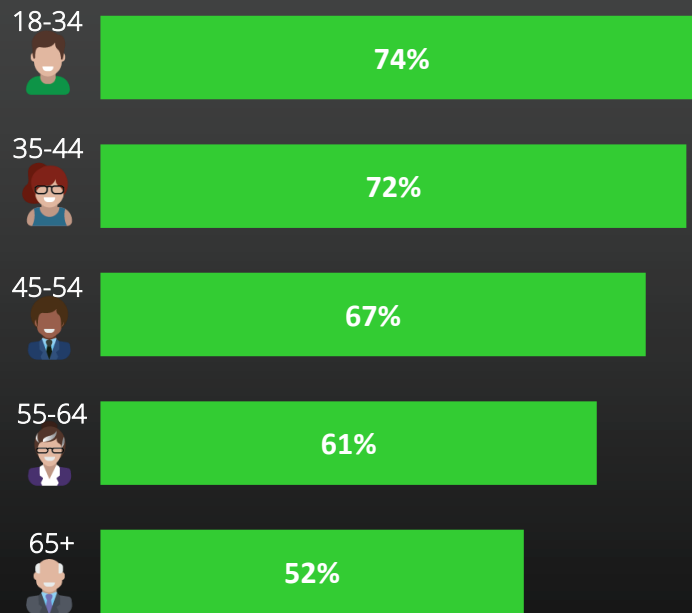
American Well®

Most consumers are willing to use telehealth

How willing would you be to have an online video visit with a doctor?



Willingness to use telehealth by age group



Consumers want telehealth for a variety of use cases



Prescription Renewals



Chronic Disease Management



Surgery and in-patient follow-up



Urgent Care

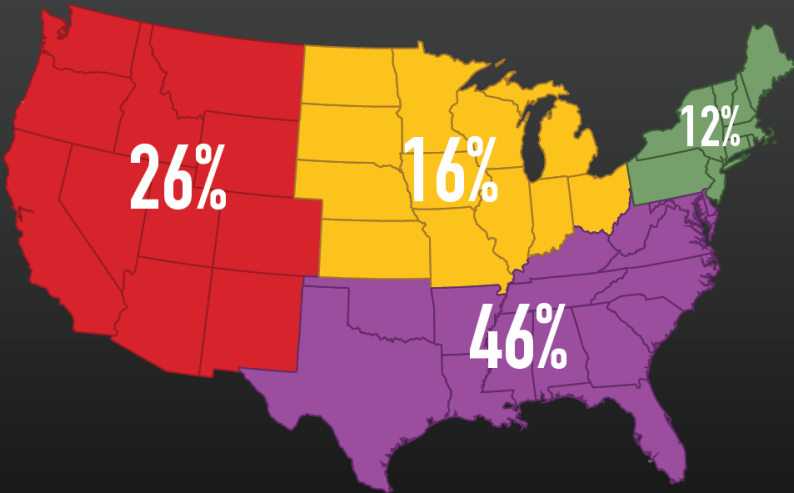


Behavioral Health

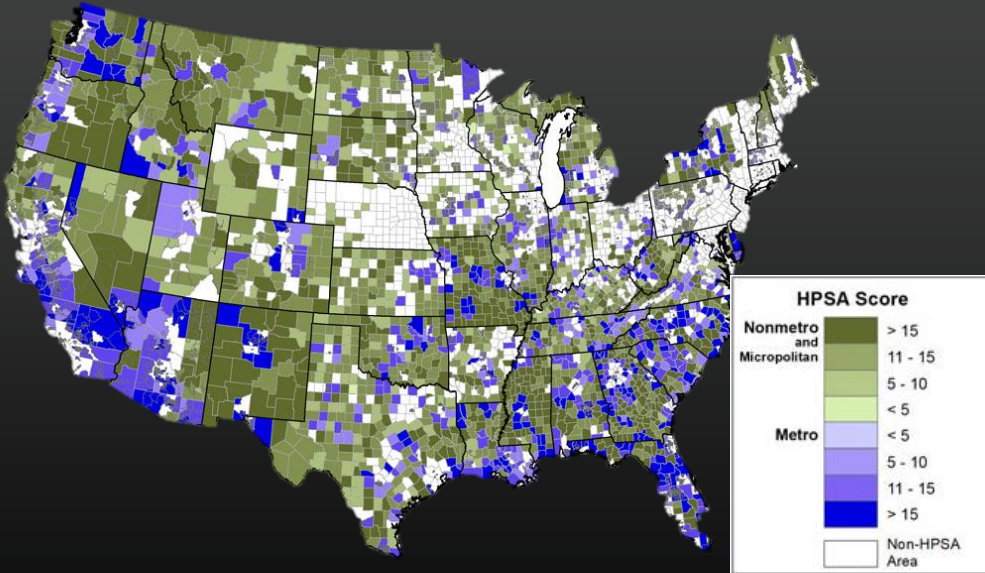
Telehealth usage is high in rural parts of the country

Consumers who have used telehealth by region

Of the 8% of consumers who have used telehealth, here is the breakdown of where they are located



Health professional Shortage Areas

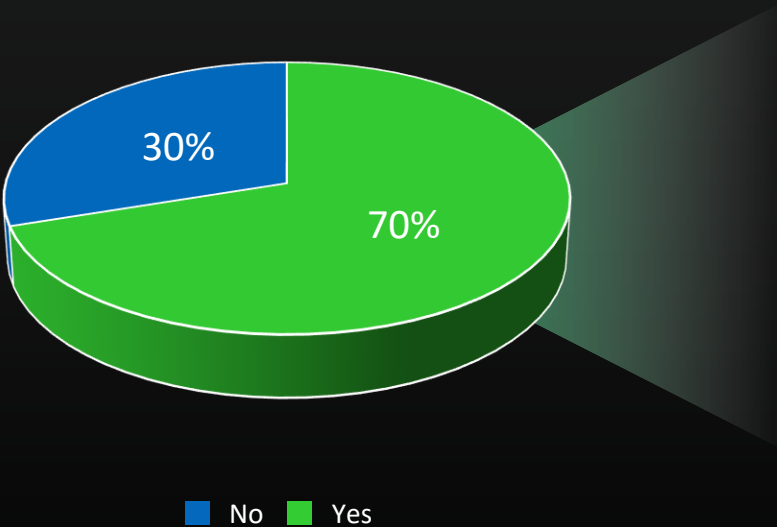


Source: Telehealth Index: 2019 Consumer

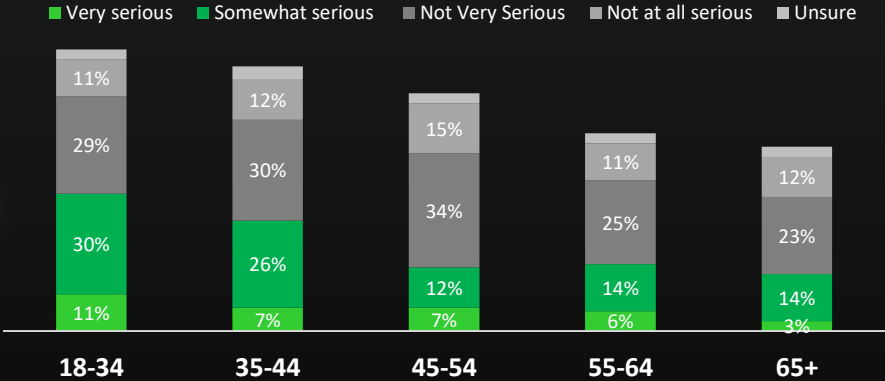
Survey
Source: Rural Health Information Hub

Access is a problem: some consumers are delaying needed care

Have you delayed talking to a doctor or nurse?



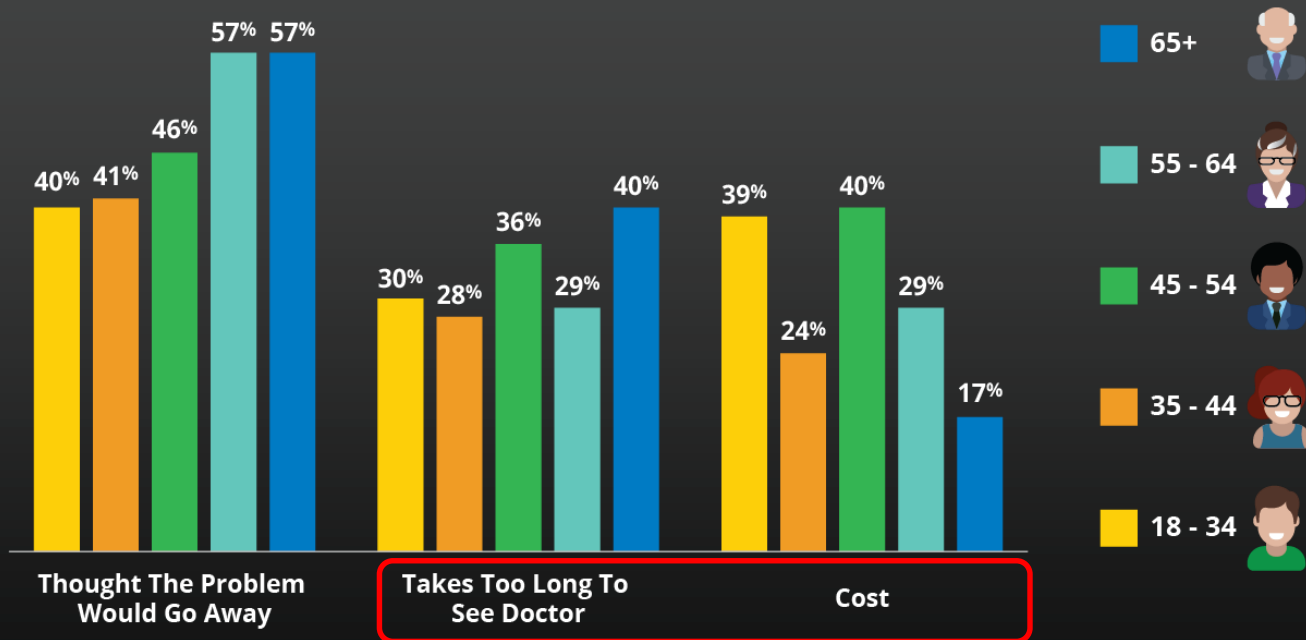
If yes, how serious was the health problem?



Base: All respondents (n=2,001)

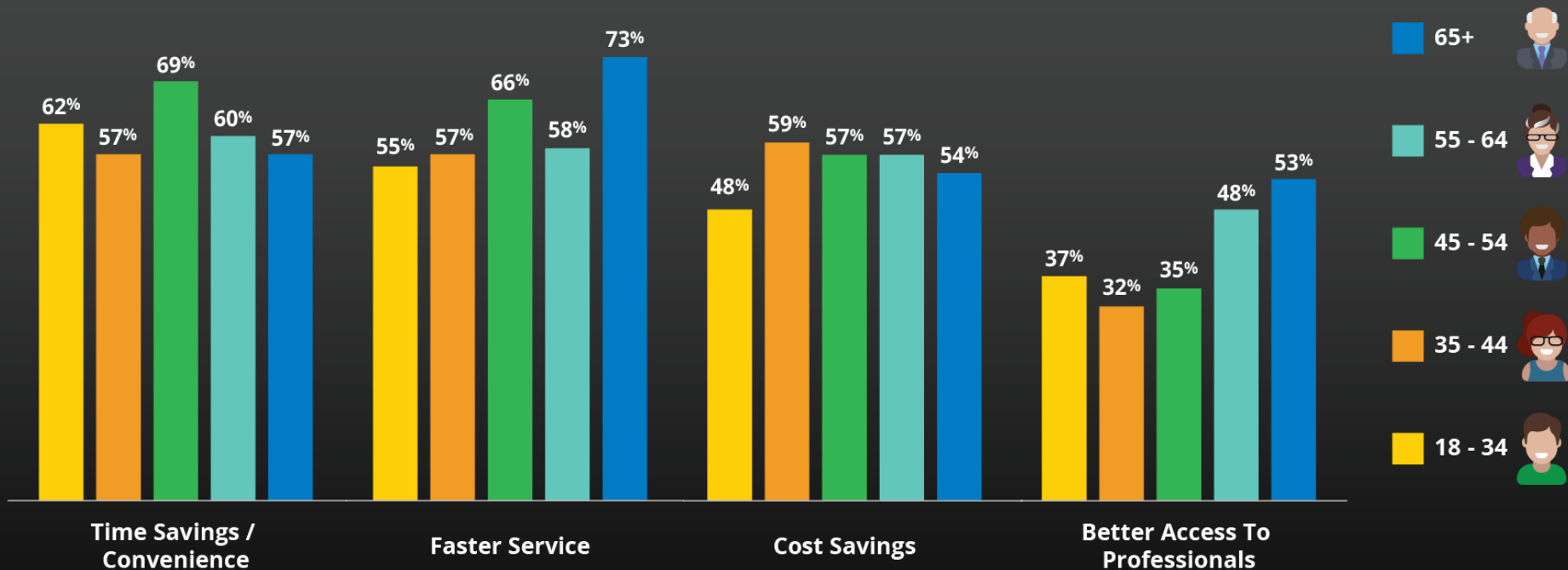
Telehealth can help consumers who are delaying needed care

Why did you delay talking to a doctor or nurse about a health problem?



Base: Have Delayed Seeing Doctor or Nurse about a Health Problem (n=1,417)

Top reasons for consumer willingness to use telehealth



Base: Respondents who are "Very" or "Somewhat" willing to have an online doctor visit (n=1,317)

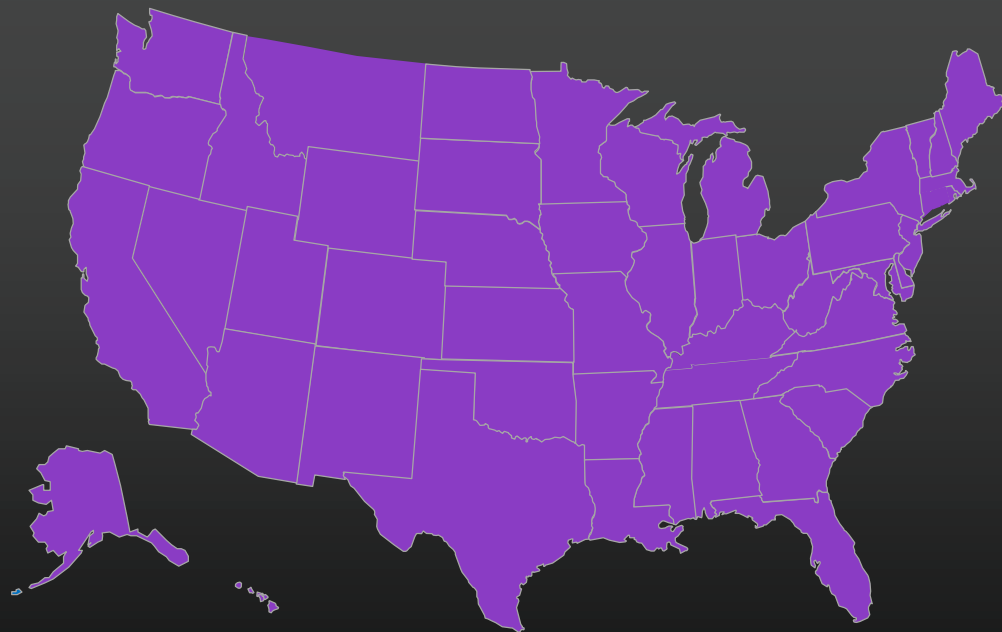


M3 GLOBAL RESEARCH

American Well®

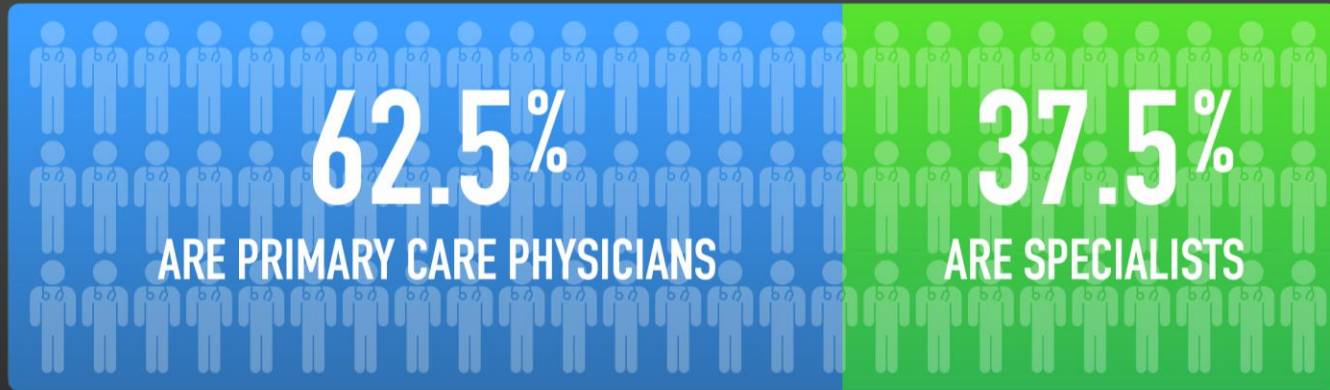
Our Physician Survey:

- ✓ 800 physicians across the U.S.
- ✓ Fielded in December 2018



Who we surveyed

Of the 800 physicians surveyed:



Specialties include:

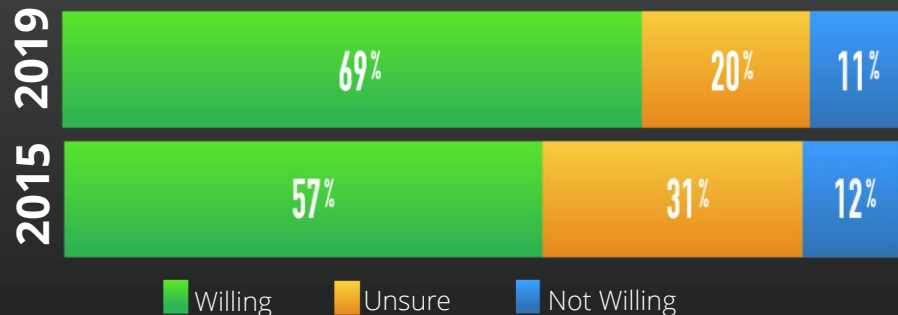
- Anesthesiology
- Cardiology
- Dermatology
- Emergency medicine
- Endocrinology
- Gastroenterology
- Infectious diseases
- Internal medicine
- Neurology
- Obstetrics & gynecology
- Oncology
- Ophthalmology
- Pediatrics – primary care
- Pediatrics – subspecialty
- Psychiatry
- Pulmonology
- Radiology
- Rheumatology
- Surgery
- Urology

A blue stethoscope is positioned diagonally across a computer keyboard. In the foreground, a clear glass globe with a grid pattern and a map of the world is placed on the keyboard. The background is softly blurred, showing more of the keyboard and the stethoscope's tubing.

Key Findings

Physicians are more willing to try telehealth

Physician Willingness to Have a Video Visit



Top Reasons:



Increase access to my patients



Flexible work-life balance



Attract and retain new patients



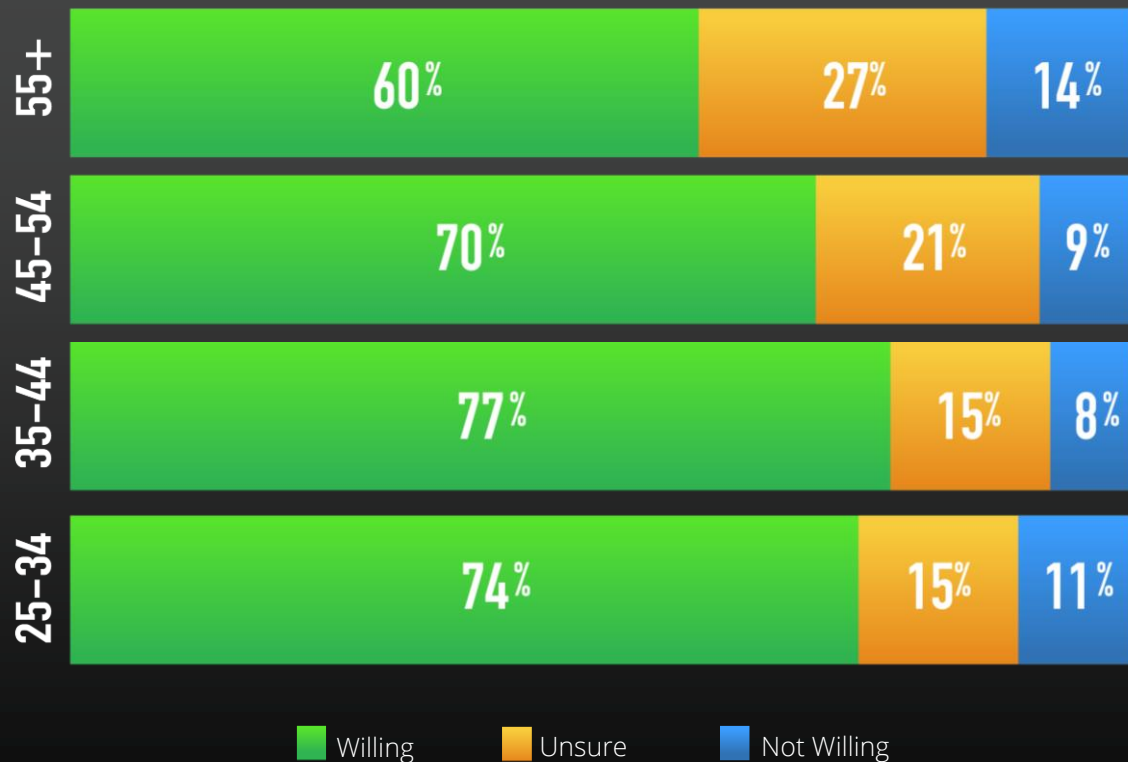
Improve outcomes for my patients



To be on the leading edge of medicine

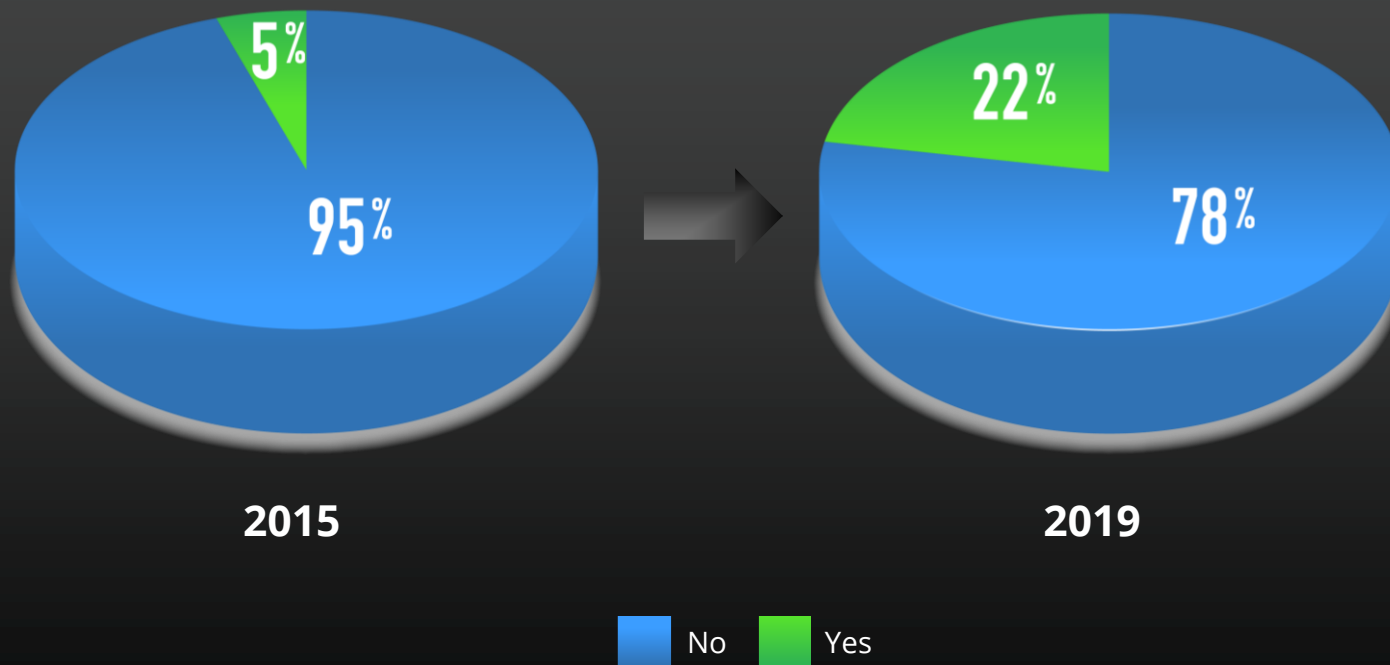
Age has an impact on willingness

Physician Willingness to Have a Video Visit by Age:

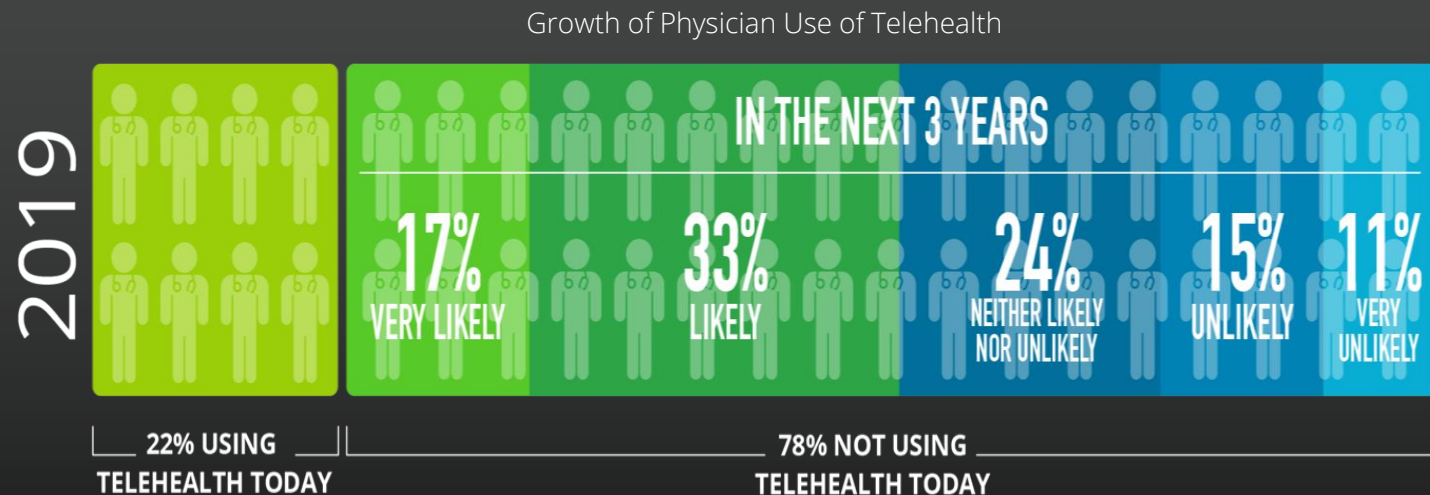


Adoption of telehealth has increased...significantly

Have you used video visits to see patients before?

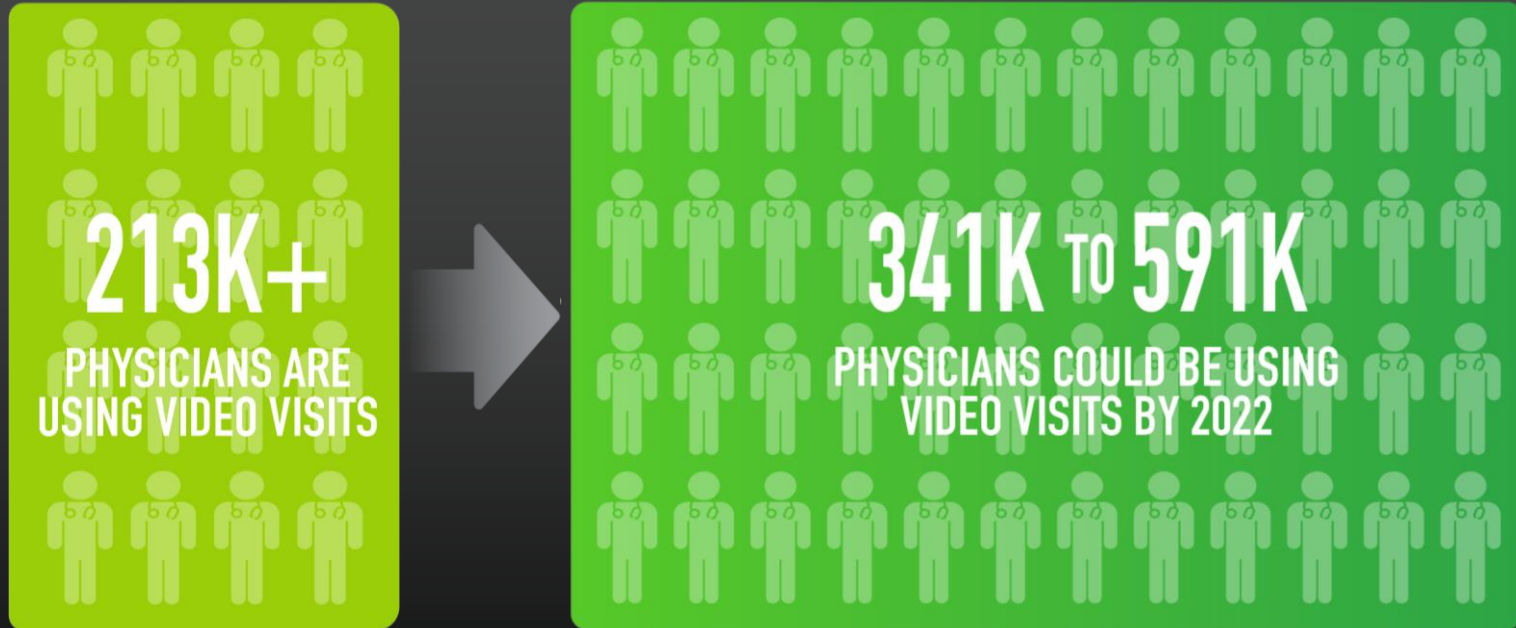


Half of physicians not using telehealth now expect to in next 3 years



Physician use of telehealth is at an inflection point

When applied to the 900,000 active physicians:



Numbers were calculated in the following way:

Providers currently using telehealth: 970,000 (number of professionally active physicians according to Kaiser) X 22% (percent of physicians who have used telehealth) = 213,400.

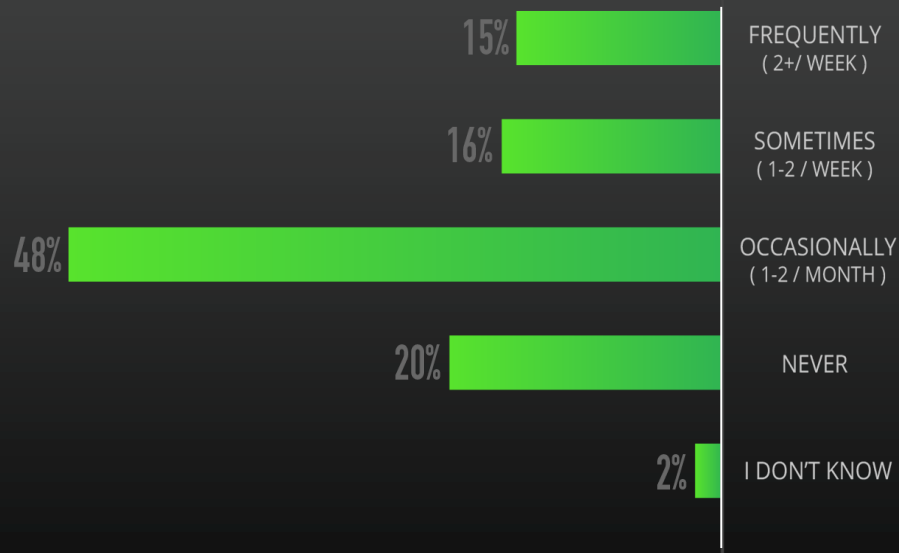
Providers using telehealth in 3 years (low estimate): 970,000 – 213,400 = 756,000 (number of physicians not currently using telehealth) 756,000 X 17% (percent of physicians very likely to start using telehealth in next three years)= 128,520 (physicians very likely to start using telehealth in next three years) + 213,400 (physicians who have used telehealth) = 341,920

Providers using telehealth in 3 years (high estimate): 970,000 – 213,400 = 756,000 (number of physicians not currently using telehealth) 756,000 X 50% (percent of physicians very likely or likely to start using telehealth in next three years)

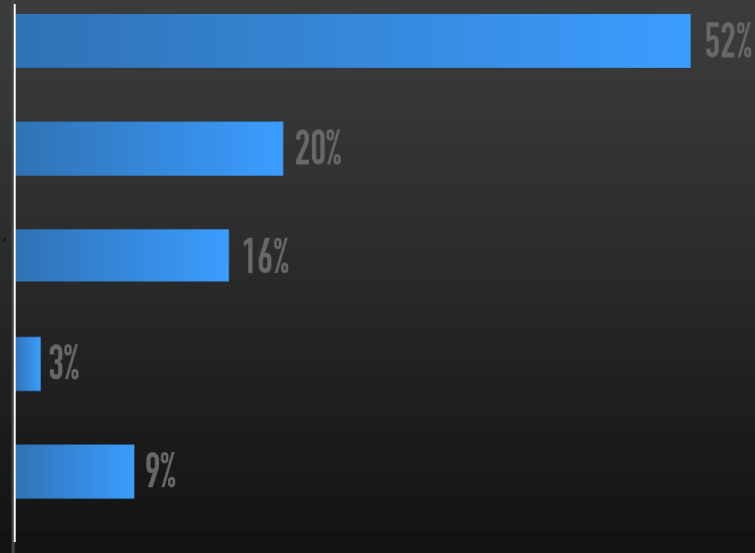
Of physicians using telehealth, half will use it frequently by 2022

OF DOCTORS WHO HAVE SEEN PATIENTS OVER VIDEO:

HOW OFTEN DID YOU CONDUCT VIDEO VISITS IN THE PAST YEAR?



HOW MANY DO YOU EXPECT TO DO 3 YEARS FROM NOW?



Physicians who have used telehealth see its value

Of the Physicians Who Have Used Telehealth:

93%

SAID IT IMPROVES
PATIENTS' ACCESS TO CARE

77%

SAID IT CONTRIBUTES TO A
MORE EFFICIENT USE OF TIME
FOR DOCTOR AND PATIENT

71%

SAID IT HELPS REDUCE
HEALTHCARE COSTS

71%

SAID IT ENABLES HIGH-
QUALITY COMMUNICATION
WITH PATIENTS

60%

SAID IT ENHANCES THE
DOCTOR-PATIENT
RELATIONSHIP

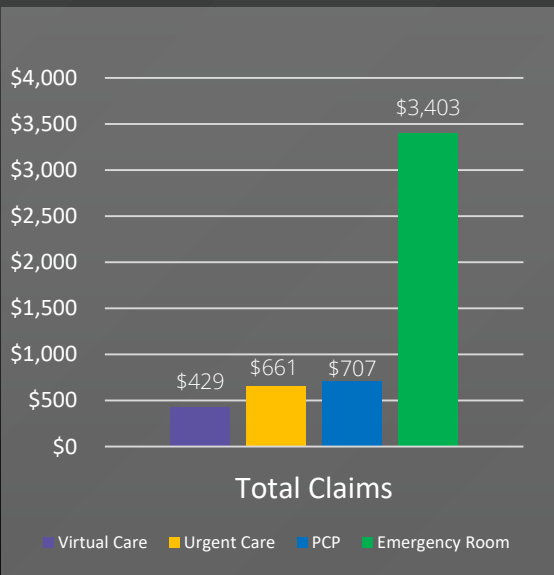
Client example: reduced healthcare costs

Not-for-profit health system based in Salt Lake City, Utah

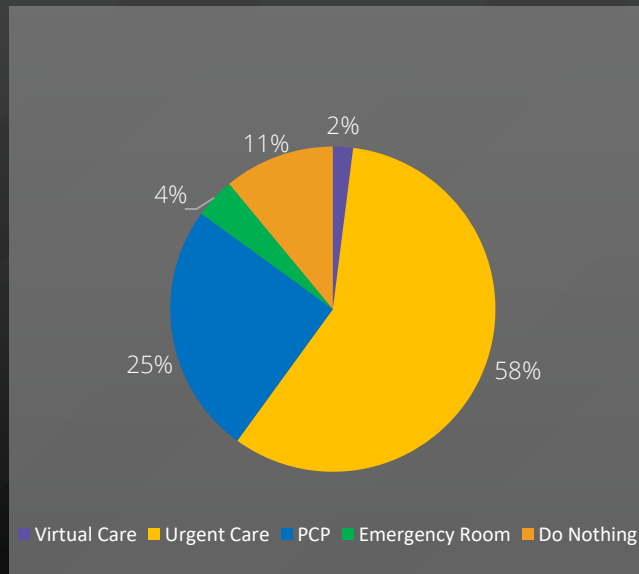
Integrated health plan (SelectHealth)

Conducted a virtual visit claims study in 2018

Total Claim Cost Per Episode (21 days)



Where people would have gone for care



Savings per claim	\$367
Claims	5,000
Total Claims Reduction	\$1,835K

Client example: High-quality communications with patients

Overview:

- Children's health system provides care in six states
- Cares for more than 400,000 patients annually
- Launched direct-to-consumer telehealth service, CareConnect, in November 2015

Results:

- Enrolled more than 17,000 patients in CareConnect
- 30% of patients have had a visit
- Top conditions treated: Rashes, fever, cough, vomiting, ear pain

Families rate CareConnect

4.7 OUT OF 5 STARS
★★★★★

97%

Of families are "highly satisfied"
with CareConnect



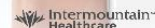
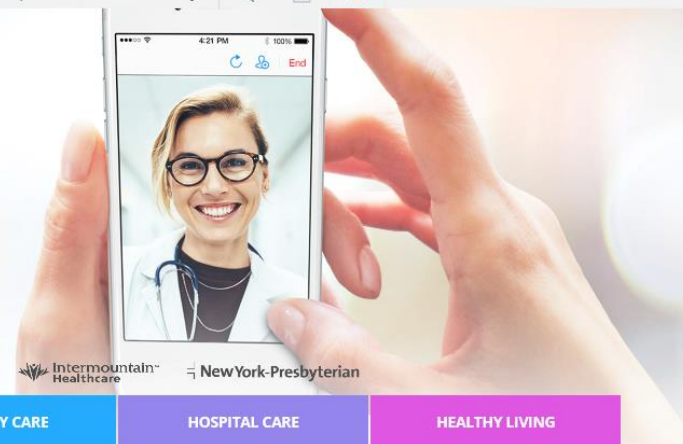


American Well Overview

Transforming from urgent care focused to a health care mall in the cloud



Your Healthcare Starts Here



URGENT CARE

The fastest way to see a doctor for common conditions (flu, infections, rashes, and more).



BEHAVIORAL HEALTH

Qualified therapists, psychologists, and psychiatrists providing evaluations and treatment.



SPECIALTY CARE

See a wide variety of specialists in your region for unique or complex courses of care.



HOSPITAL CARE

Follow-up care and outpatient services by the nation's leading hospitals and clinics.



HEALTHY LIVING

Programs for a healthier life like nutrition, weight loss, breastfeeding support, and more.



Urgent Care

Board-certified doctors are available for on-demand video visits 24/7 to help you feel better faster.

Commonly Treated Conditions:

- Cough & Cold
- Sinus Infections
- Flu
- Strep Throat
- Pink Eye
- UTI



The features of Amwell

- Live, on-demand video doctor visits 24x7/365 or scheduled visits
- Four modalities to access care; smartphone, tablet or computer, kiosks
- Available in all states with an average wait time of 10 minutes
- Integration with Health Plans
- Choice of board certified, network doctors
- Secure and private, HIPAA compliant video visit
- E-prescribing to your pharmacy of choice*



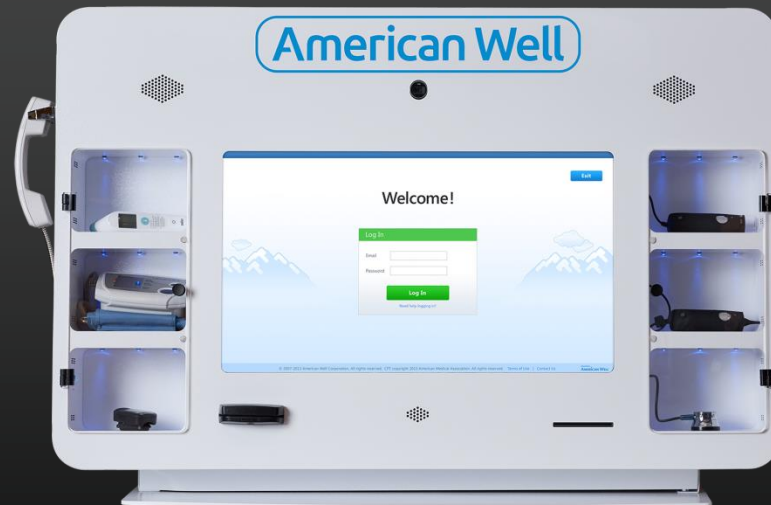
Commonly Treated Medical Conditions

- Abrasions, minor wounds
- Acne
- Anxiety
- Asthma
- Allergies/allergic rhinitis
- Back pain
- Cough/Cold
- Depression
- Diabetes/hypoglycemia
- Diarrhea
- Ear pain
- Fever
- Headache/migraine
- Hypertension
- Incontinence
- Incontinence
- Influenza/flu
- Insomnia
- Nausea/Vomiting
- Obesity
- Pinkeye and other eye infections
- Rashes/skin disturbances
- Sinus infection
- Smoking cessation
- Sore throat/pharyngitis
- Sprains and strains
- Urinary tract infection



The telehealth kiosk: an introduction

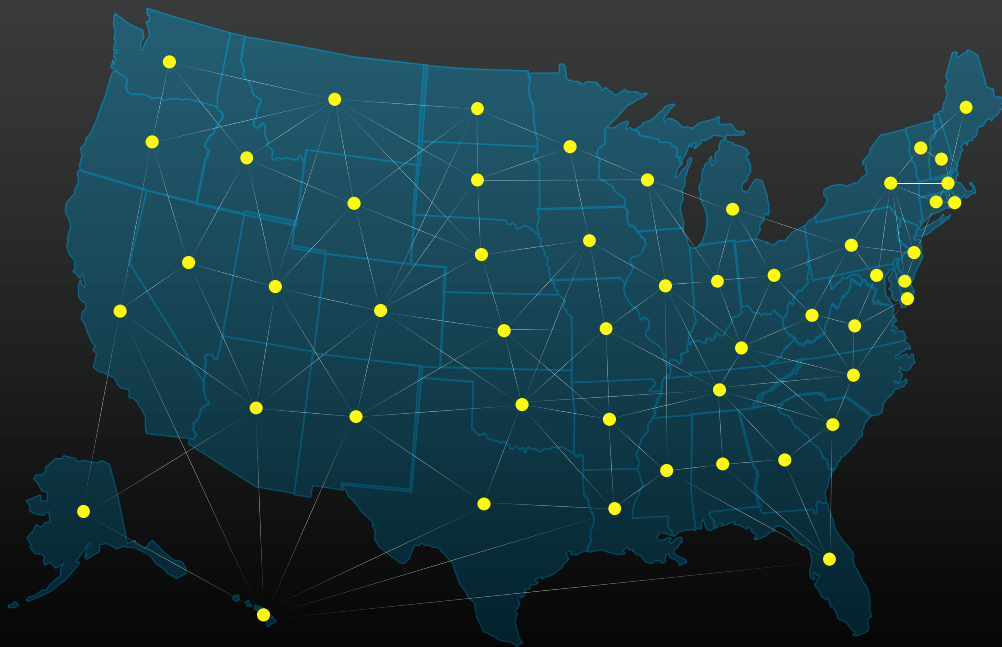
- Built as a point-of-care health station
 - Facilitates clinically informed visits, for patients and providers
- Delightful patient experience
 - Touch interface
 - Natural workflow progression
 - Integrated tools and peripherals
- National telehealth network under the hood
 - Medical, nutrition, behavioral health
 - Incorporate your own providers—or use ours!
- Professional manufacturing, install & support
 - UL certified for safety and compliance



Online Care Group

Covering 50 states

Urgent Care | Behavioral Health | Nutrition | Breastfeeding Support



- National Medical Group – telehealth only
- Uniquely trained and experienced in telehealth
- Board-certified, multi-state licensed physicians
- Multi-disciplinary including urgent care, behavioral health, nutritionists and lactation consultants
- Patient choice of provider
- 24/7/365
- 5-10 minutes average wait time for Urgent Care
- Network Operations Center supports quality assurance, credentialing, and scheduling
- Mixed network compatibility works in conjunction with your clinical initiatives and providers
- NCQA-Certified (100% audit), FSMB Compliant, First to be ATA accredited

The future is already here
— it's just not very evenly
distributed.

WILLIAM GIBSON



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